

Resource *Raves!!*

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Leveraging brain power with word power

A Capital Experience

That's what Capital Market Consultants LLC (CMC) intends for you to have as one of its clients. And according to the clients we talked to, that's exactly what's in store.

But who is CMC? The firm specializes in coaching financial advisors, investment management firms, money managers, and CPAs wishing to develop an investment management business in making the most of open architecture investment management, says Barry K. Mendelson, CIMA, AIFA, and founder and managing director of the firm.

"I've been a retail investment consultant, an institutional investment consultant, and a product designer," says Mendelson. "And I've designed, administered, and run successful retail and institutional investment practices from scratch." The three things that set CMC apart are knowledge, credentials, and calibration, he states.

The term "open architecture" means more to Mendelson and CMC than just having access to money managers across a variety of firms. "It's an investment advisory approach that incorporates everything from asset allocation to the pairing of investment managers across firms all the way to the proper implementation of portfolio solutions for clients."

CMC's clients include First Business Bank of Wisconsin and Robert W. Baird and Company, Inc. Joan Burke, president of First Business Bank's Trust Division says, "He understands what we do. He knows the marketplace so he understands the ins and outs of trying to put these types of programs together."

"Barry gave us a global assessment of our business and its processes," says Doug Wenzel, Vice President – Investments, Senior Investment Consultant at Baird. "He's helped us standardize different parts of the practice so that it all works together better."

Capital!

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